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ABSTRACT

The history of the Bush Public School Executive Fellows program is described. The primary objective of the program is to increase the ability of chief Minnesota school executives to guide and direct the design and delivery of public education in a more effective and efficient manner. Participation is designed to increase their ability to more effectively mobilize and increase resources available to achieve their goals. The curriculum for the Bush Program is organized around strategy for formulating and implementing a school district plan. Attention is focused on the knowledge, skills, and attitudes necessary to lead a school organization. The course involves 30 days of intense instruction during the summer and academic year at retreats and is aimed at the line-operating executive, usually the superintendent of the local public school district, although other central office administrators (e.g., assistant superintendent, directors of special education) are admitted especially from larger school districts. Each year the selection committee strives for a mixture of people from rural, small, large, suburban, and central city school districts. Topics that have been addressed include: strategic planning and policy development and implementation, school-community relations, organizational behavior and interpersonal skills, marketing, and financial management. Participants are involved in class discussion, small group meetings, work teams, individual presentations, and role playing. The schedule for the July 1981 week module is appended. An evaluation of the achievement of program objectives, which are listed in the appendix, was undertaken by an outside group. A summary of the findings, evaluation methodology, and recommendations also are appended, along with a request for proposals and a statement of the program philosophy. (SW)

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PART I

HISTORY OF THE BUSH PROGRAM

by John Mauriel

A. INITIATION BY THE FOUNDATION

The Bush Public School Executive Fellows program was initiated because of a desire on the part of the Bush Foundation, a private regional foundation in St. Paul, Minnesota to have an impact on the management of public education in the State of Minnesota. The Foundation felt this program should be modeled after those management courses offered by major university business schools which heavily utilize the case method of instruction. In discussing plans for the program with a variety of people around the country, the Foundation was led to Professor John Mauriel of the University of Minnesota's Graduate School of Business Administration, and Director of that School's six week course for senior business executives.

B. COURSE DESIGN

The course involves 30 days of intense residential instruction, offered in remote retreat locations, in a format as follows:

a) 12 days in the summer;
b) 6 days in each of three weeks spread through the subsequent academic year;
c) summer field project;*
d) four final days in the fall - approximately 16 months after the starting date.

* During the ssecond summer of his or her fellowship period, the participant is required to do a field project and then report back the results of that project to the entire group and the faculty during the final session. The field project was to be an action research program in which the participant would work on some problem of importance to the school district, in an attempt to provide some useful application of ideas discussed during the first 30 days of instruction.

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C. DEVELOPMENT OF COURSE MATERIALS

Extensive case development was required, because at the time of inception of the program in 1976 not enough good case material was available which could raise the crucial managerial issues for the mid 1970s and 1980s for discussion situation, dillemas, problems, etc. In the first years of the program more

than $30,000 was invested in case writing by the Program Director, and faculty members and graduate students they supervised.

D. ADMISSION POLICY

The program is aimed at the line operating executive, usually the superintendent of the local public school district, although other central office administrators (assistant superintendent, directors of special education, etc.) are admitted, especially from larger school districts. Each year the selection committee strives for a good mixture of people from rural, small, large, suburban, and central city school districts. This committee, consisting of two superintendents, a former State Commissioner, the Foundation's program officer and the program director, selects twenty five applicants each year to receive a Bush Fellowship.

E. SELECTION OF FACULTY AND TOPICS

Faculty are sought who have a combination of experience with the case method, or use other participative simulation approaches to learning, and are actively involved in practical, applied research on problems or issues of concern to the chief administrative officer(s) of organizations. Topics chosen for the first program included mostly those which were identified by the prospective participants and other educational officials during the planning interviews, as well as some topics Professor Mauriel, and some of the faculty, felt were important to the managerial education of a mid-career executive. Following is a list of these topics:

1. Strategic Planning and Policy Development and Implementation.
2. Topics in School Community Relations.
3. Organizational Behavior and Interpersonal Skills.
4. Marketing.
5. Planning and Financial Management and Decision Making.
6. Labor Relations, Collective Bargaining, Mediation, Arbitration.
7. Management and Organization.
8. Goals of Mission/Strategy Development.

F. ADMINISTRATION AND SIZE OF GRANT

MASA, with its vast network of membership and communication channels, administers the grant, promotes the program and recruits applicants.

In addition, a grant of $1,200 is made to each participant for seed money for hiring consultants and/or assistants for the field project. The amount awarded for the first offering of the program in 1976 was approximately $250,000. Currently the budget is $12,000 per participant.

G. DESIGN AND SCHEDULE

The program is intense and requires full time involvement of participants from the beginning of a module on Sunday evening, until its conclusion on Saturday noon for a one-week module, or 12 days later for the two week module. A typical participant day begins at 8:00 a.m. with a class discussion and ends with the conclusion of a small group (syndicate) meeting at 9:30 or 10:00 p.m. During the day participants have various responsibilities to their syndicate teams; for individual preparation; for presentation; for class discussion or role playing. Careful attention is paid by the faculty and director and associate director to the social dynamics of work teams and the total group. The design and composition of groups is carefully thought through and group process critiques are held from time to time by participants and staff to evaluate how each participant and staff member is contributing to the program's learning objectives. Peer pressure, Socratic instructors, relevant materials, and a tone of seriousness of purpose all contribute to the learning environment.

EXHIBIT I is the schedule for the spring 2 week module of Bush VI, held in July 1981.

A statement of the philosophy and general objectives developed by the director in consultation with the faculty of the program is attached as EXHIBIT II.

H. EVALUATION PLAN

In late 1980, at the request of the program director and the Foundation, an evaluation committee was formed to develop a plan for engaging an outside group to examine how well the program was achieving its objectives.

The committee consisted of members of the program's advisory board plus the academic and administrative directors, and was chaired by one of its co-founders and initial administrative director Dr. John M. Maas.

The committee formed a list of questions they wished to have answered about the program and from that developed a Request for Proposal (RFP). EXHIBIT III.

The RFP was sent to a wide range of individuals and agencies which the committee felt had the potential knowledge and skill to conduct the evaluation.

The committee selected Projects for Educational Development (PED) to conduct the study. Some of the factors involved in this choice were:

- PED's proposal seemed to give evidence of a deep understanding of the complexity of the evaluation being requested as well as an understanding of the nature of the objectives the Bush Program is pursuing. On the other hand, PED seemed willing to quantify those items which were important and quantifiable while recognizing a need to use systematic observations of crucial qualitative factors and subjectively evaluate performance in these areas. Finally, PED had experience in evaluating other similar management education programs.

I. EVALUATION METHODOLOGY AND FINDINGS

An executive summary of the methodology, findings and recommendations provided to the committee by PED is attached as EXHIBIT IV.

The highlight of the findings, besides their very favorable nature, was the fact that the data collected seemed to reflect stronger impact on participants in areas where the program was attempting to have impact than in areas where the program staff put less emphasis.

This seemed to verify both the sensitivity of the measures used by the evaluators and the success of the program in successfully focussing on and achieving its most important objectives.

Exhibit I

BUSH PUBLIC SCHOOLS EXECUTIVE FELLOWS PROGRAM

BUSH VI

July 12 - 24, 1981 Telemark Lodge, Cable Wisconsin

DAILY SCHEDULE

Advance Assignments: ESSENTIALS OF ACCOUNTING, INSIDE HIGH SCHOOL, DASHMAN, PLEASANT HAVEN A, THE USE OF CASES IN MANAGEMENT EDUCATION, BECAUSE WISDOM CAN'T BE TOLD

SUNDAY, July 12

2:30 - 4:30 P.M.	Check-in	
4:30 - 6:30	Discussion of DASHMAN (All general sessions of the total group will be held in Namekagon C. All sessions will be started promptly. Please be in your seats ready to begin at the scheduled time.)	John Mauriel Program Director
6:30 - 7:30	Dinner (All dinners will be in the main Dining Room unless otherwise indicated.)	
7:30 - 8:15	Introductory session	Charlotte Mitau Associate Director John Mauriel
8:15 - 9:15	Introduction to Organizational/Administrative Behavior sessions The role of values and individual differences in administrative decision making Namekagon C	Dr. Ken Myers, Asst. Professor of Management and Organizational Behavior, University of Minnesota Dr. Charles Bisanz Consultant & Attorney, Felhaber, Larson, Fenlon & Vogt.

MONDAY, July 13

7:00 - 7:45 A.M.	Breakfast (The area to the left in the Coffee Shop is reserved for the Bush Program. Please be there as close to 7:00 as possible and order your breakfast from the menu. Your breakfast check will be held at the cashier's counter for Charlotte to sign and will be charged to the Bush Program.)	

MONDAY, July 13, continued

8:00 - 8:15	Learning Journal Namekagon C	
8:15 - 8:45	A communications and feedback model	Myers Bisanz
8:45 - 10:15	Barriers and opportunities in effective administrative communications Room 2000	
10:15 - 11:15	The administrator as helper and consultant Namekagon C Beverages available	
11:15 - 12:00	An introduction to the dynamics of workgroups and the criteria for effective workgroup functioning	
12:00 - 12:45	Luncheon	
12:45 - 3:45	Effective decision making in groups Namekagon C and adjacent room to be announced	
3:45 - 5:30	Recreation break	
5:30 - 6:30	Dinner	
6:30 - 9:30	Dynamics between workgroups (Conflict or Cooperation?) Namekagon C.	
9:30 - 9:45	Introduction to critique in the administrative team	
9:45 - 10:45	Syndicates on critique Syndicate rooms	

TUESDAY, July 14

7:00 - 7:45 A.M.	Breakfast	
8:00 - 8:15	Learning Journal	
8:15 - 9:50	The administrator as an agent of planned organizations change Namekagon C	
9:50 - 10:30	Syndicates meet on PLEASANT HAVEN A Namekagon C Beverages available	
10:30 - 12:00	Discussion, PLEASANT HAVEN A	Mauriel
12:00 - 12:30	Individual preparation of PLEASANT HAVEN B Namekagon C	
12:30 - 1:15	Luncheon	
1:15 - 2:00	Discussion, PLEASANT HAVEN B	Mauriel
2:00 - 2:45	Read and discuss PLEASANT HAVEN C	
2:45 - 4:30	Recreation break	
4:30 - 6:00	Individual preparation, STALWART SUPERINTENDENT	

TUESDAY, July 14 -(continued)

6:00 - 7:00	Dinner	
7:00 - 8:15	Discussion, STALWART SUPERINTENDENT	Dan Lortie, Professor Dept. of Education, University of Chicago
8:30 - 10:00	Individual preparation, KENNEDY HIGH SCHOOL	

WEDNESDAY, July 15

7:00 - 7:45 a.m.	Breakfast	
8:00 - 8:15	Learning Journal	
8:15 - 9:45	Discussion, KENNEDY HIGH SCHOOL (short range)	Lortie
9:45 - 10:00	Beverage break	
10:00 - 11:00	Syndicates meet, KENNEDY HIGH SCHOOL (long range)	
11:15 - 12:30 p.m.	Discuss KENNEDY HIGH SCHOOL (long range)	Lortie
12:30 - 1:15	Luncheon	
1:15 - 2:30	Lecture on Special Characteristics of Schools	Lortie
3:00 - 5:30	Canoe trip Pickups at Townhouse circle 2:50 - 3:00 p.m.	
6:00 - 7:00	Dinner	
7:00 - 8:00	Individual preparation, INSIDE HIGH SCHOOL	
8:00 - 9:00	Diagnostic discussion, INSIDE HIGH SCHOOL	Lortie
9:15 - 10:00	Syndicates meet in Townhouses on INSIDE HIGH SCHOOL	

THURSDAY, July 16

7:00 - 7:45 a.m.	Breakfast	
8:00 - 8:15	Learning Journal	
8:15 - 9:15	Discussion, INSIDE HIGH SCHOOL (continued)	Lortie
9:15 - 9:45	Briefing on ENROLLMENT PROJECTION PROGRAM	Mauriel
9:45 - 10:00	Beverage break	
10:00 - 11:45	Run ENROLLMENT PROJECTION PROGRAM Computers and program available Individual preparation, THE CONFERENCE	
12:00 - 12:45 p.m.	Luncheon	
12:45 - 2:30	Recreation break (Computers available)	
2:30 - 4:00	Discussion, THE CONFERENCE	Lortie
4:15 - 5:15	Discuss PLEASANT HAVEN enrollment projections and assumptions	Mauriel
5:15 - 6:30	Lecture on Teachers	Lortie
6:30 - 7:30	Dinner	
7:30 - 10:30	Work on Financial Planning Model and prepare Syndicate report on recommendations for PLEASANT HAVEN F, G, H Computers and program available	

FRIDAY, July 17

7:00 - 7:45 a.m.	Breakfast	
8:00 - 8:15	Learning Journal	
8:15 - 10:30	Syndicate reports on PLEASANT HAVEN F, G, H	Mauriel
10:30 - 10:45	Beverage break	
10:45 - 12:30 p.m.	Critique on Process	Mauriel
12:30 - 1:15	Luncheon	
1:15 - 2:15	Lecture on Principals #1	Lortie

FRIDAY, July 17 (continued)

2:30 - 3:30 p.m.	Individual preparation of THE LETTER	
3:30 - 5:00	Partners arrive-- Recreation break	
5:15 - 6:00	Social hour with Partners Room 2000	
6:00 - 7:15	Dinner-- Barbecue, pond-side	
7:15 - 9:00	"The One Car Family"	Mauriel
9:00 - ?	Dancing-- Night Club on top floor of the Lodge	

SATURDAY, July 18

7:15 - 8:15 a.m. Breakfast

Fellows		Partners	
8:30 - 8:45	Journal	8:30 - 8:45 Overview	Mauriel
8:45 - 9:45	Task Force Projects	8:45 - 9:45 Individual preparation and Syndicates meet on DASHMAN	
10:00 - 11:00	Lortie lecture on Principals #2 and summary	10:00 - 11:00 Discuss DASHMAN	Mauriel
11:10 - 11:55	Syndicates meet on THE LETTER Fellows and Partners (Beverages served in Syndicate areas)		
12:00 - 1:00 p.m.	Luncheon		
1:00 - 2:30	Joint discussion of THE LETTER Distribute WJAC to Fellows		Lortie
2:30 - 6:30	Recreation break		
6:30 - 7:30	Social hour, Room 2000		
7:30 - 9:00	Dinner		
9:00 - ?	Dancing, Telemark Lodge Nite Club		

SUNDAY, July 19

7:00 a.m.	Optional breakfast	
11:00 - 11:45	Brunch	
12:00 - 1:00 p.m.	Entertainment-- Chris Blanchard	
1:00 - 3:00	Recreation break (Partners leave at 3:00 p.m.)	
3:00 - 4:00	Individual préparation WJAC	
4:00 - 5:30	Discuss WJAC	Regina Herzlinger, Professor Business Administration, Harvard University
5:30 - 6:30	Dinner	
6:30 - 8:30	Second preparation of WJAC	
8:30 - 10:00	Individual preparation, DULUTH	
10:00 - ?	Syndicates meet, WJAC and DULUTH	

MONDAY, July 20

7:00 - 7:45 a.m.	Breakfast	
7:45 - 8:00	Journal	
8:00 - 9:30	Discussion, WJAC (second time)	Herzlinger
9:30 - 9:45	Beverage break	
9:45 - 11:15	Discussion, DULUTH	Herzlinger
11:20 - 12:15 p.m.	Individual preparation, DEARDEN COLLEGE	
12:15 - 1:00	Luncheon	
1:00 - 2:10	Continue individual preparation DEARDEN COLLEGE	
2:15 - 3:45	Discuss DEARDEN COLLEGE	Herzlinger
3:45 - 6:15	Quick look at GENRAD, ZERO BASE BUDGETING NOTE during this break	
6:15 - 7:15	Dinner	
7:15 - 8:15	Individual preparation, GENRAD	
8:15 - ?	Individual preparation TEXAS INSTRUMENTS	

TUESDAY, July 21

7:00 - 7:45 a.m.	Breakfast	
7:45 - 8:00	Journal	
8:00 - 8:45	Syndicates meet on GENRAD and TEXAS INSTRUMENTS	
9:00 - 10:30	Discuss GENRAD	Herzlinger
10:30 - 10:45	Beverage break	
10:45 - 12:15 p.m.	Discuss TEXAS INSTRUMENTS	Herzlinger
12:15 - 1:00	Luncheon	
1:00 - 3:00	Recreation break	
3:00 - 6:30	Individual preparation, MASSPORT (2 hours) and write up Back Home Application (control system?) Hand in written assignment at 6:30 p.m.	
6:30 - 7:30	Dinner	
7:30 - 9:30	Individual preparation, METROPOLITAN MUSEUM OF ART	

WEDNESDAY, July 22

7:00 - 7:45 a.m.	Breakfast	
7:45 - 8:00	Journal	
8:00 - 8:45	Syndicates meet on METROPOLITAN MUSEUM OF ART and MASSPORT	
9:00 - 10:30	Discuss MASSPORT	Herzlinger
10:30 - 10:45	Beverage break	
10:45 - 12:15 p.m.	Discuss METROPOLITAN MUSEUM OF ART	Herzlinger
12:15 - 1:00	Luncheon	
1:00 - 2:15	Discuss Application Assignment and Wrap-up	Herzlinger
2:15 - 2:30	Beverage break	
2:30 - 3:30	Continue discussion	Herzlinger
4:00	Side trip to "Historyland" in Hayward, tour the Old Hayward Craft shops, etc.	
5:15	Social Hour at the Clark House in Hayward	
6:15	Dinner at the Cook Shanty, and return to Telemark	
7:30 - 9:30	Personal Productivity See separate Syndicate list for Tor Dahl's sessions	Tor Dahl Tor Dahl & Associates, St. Paul, MN

THURSDAY, July 23

7:00 - 7:45 a.m.	Breakfast	
7:45 - 8:00	Learning Journal	
8:00 - 10:00	Personal Productivity-- Principles and Practice	Dahl
10:00 - 10:15	Beverage break	
10:15 - 12:00 Noon	Personal Productivity, continued	Dahl
12:15 - 1:00	Luncheon	
1:00 - 3:00	Recreation break	
3:00 - 5:15	Work Groups on Personal Productivity Group Presentation	Dahl
5:30 - 6:00	Formal Group photo Laukka Theater	
6:00 - 7:00	Dinner	
7:00 - 9:30	Stress Management and Satisfaction Enhancement	Dahl

FRIDAY, July 24

7:00 - 7:45 a.m.	Breakfast	
7:45 - 8:00	Learning Journal	
8:00 - 9:45	Work group on Stress-Satisfaction Group Presentations	Dahl
9:45 - 10:00	Beverage break	
10:00 - 10:45	Lifestyle Change-- The "Whole Manager" Concept	Dahl
11:00 - 12:00 Noon	Each Syndicate prepares answers to the question, "What will I do with what I've learned?"	
12:00 - 12:30	Syndicate reports	
12:30 - 12:50	Fill out Feedback forms and turn in to Charlotte	
12:50 - 1:00	Wrap-up and announcements	Mauriel
1:00 - 1:45	Luncheon	
1:45	Adjourn	

EXHIBIT II

BUSH PROGRAM

PHILOSOPHY AND OBJECTIVES

STATEMENT

DRAFT - FOR DISCUSSION

June 20, 1980

The primary objective of the Bush Public Schools Executive Fellows Program is to influence positively the ability of Chief Minnesota School Executives to guide and direct the design and delivery of public education in a more effective and efficient manner. The aim is to work toward a better use of the limited human, financial, and physical resources available and to achieve educational results evermore responsive to the needs and demands of the public and of the student. While there is a legislative limit to the resources which might be potentially available to public education the program does attempt to provide participants as individuals and as a group with an increased ability to more effectively mobilize and increase resources available to achieve their goals.

The overall curriculum for the Bush Program is organized around a framework which is essentially an outline or structure for the process of formulating and implementing a school district strategy. The general objective in using this framework is to help participants focus on designing strategies which are more responsive to fundamental cultural, social, political, economic, and technological trends and realities, and also are more appropriate to the organizations present and potential resources and capabilities. Additionally, this focus is designed to facilitate the further development of skills useful for implementing action programs capable of achieving objectives inherent in the strategy.

The program focusses on the knowledge, skills and attitudes necessary to lead a school organization as the CAO or as one reporting to the CAO.

However, most of the knowledge, skills and attitudes are also useful to executives in leadership roles in other kinds of organizations.

Most emphasis is placed on skill development with appropriate conceptual and theoretical input provided as needed to facilitate skill development. Finally, opportunities are provided to examine and change attitudes of participants as might be appropriate and helpful in enhancing their ability to define and achieve results. The basic attitudes which we attempt to influence in the program include: 1) enhancing participant's appreciation of the need for analytical and communication skills and 2) developing a willingness and receptivity on the part of participants to become change agents.

The general objectives described below for each of three areas--Knowledge, Skill and Attitude--guide the faculty in design and delivery of the program.

Knowledge Objectives

1. To develop understanding of the critical and managerially useful research evidence on:

   Motivation

   Conflict Resolution

   Impact of decision styles

   Survey design

   Use of control systems

   Change introduction

2. To develop understanding of theory and methods for:

   Conducting Social Research (Action Research)

Pro forma financial projections

Financial Analyses

Enrollment Projections

Passing a Referendum

3. To develop understanding of concepts such as:

   Market Segmentation

   Political Structure Analysis

   Conflicting Management Styles

   Fixed and Variable Costs - Cost Behavior

   Financial Ratios - Financial Analysis

   Strategic Planning Framework

4. To impart understanding of Minnesota School Finance formulas and trends and legislative trends, including the underlying forces which seem to make these trends.

Skills

To develop skills in:

1. Analysis and Diagnosis

2. Planning/Control/Goal Setting/Mission Formulating

3. Evaluation/Defining and Describing Educational Results and Output

4. Decision-Making
   How and when to employ which style

5. Interpersonal/Influence/Conflict Management/Delegation/ Negotiation/Meeting Management

6. Data Gathering/Needs Identification/Problem Identification/ Inquiry

7. Leadership/Getting Results Through Others or Through Obtaining

and Mobilizing Resources (approval, enabling legislation, etc.)

8. Managing Resources Effectively
   Identifying budget problems
   Presenting and deciding resource allocation decisions

9. Understanding and using internal and external political processes to obtain results

10. Financial Forecasting and Budgeting

11. Communication/Presentation/Articulation

12. Image Building/Sales/Marketing

13. Interpreting Current Trends

    Education options
    Place of technology

Attitudes

We attempt to influence attitudes in participants such as belief in the following ideas:

1. Sensitivity to more groups and variables will lead to better management results.
2. Analysis is o.k. in an action-oriented world.
3. Community values are relevant and important to certain decisions.
4. Providing alternatives, data analysis, pros and cons is useful, helpful and appropriate behavior in certain situations.
5. Management is complex/therefore important/therefore not easy/ answers not simple and obvious.
6. Tolerance for ambiguity, unclarity and even lack of cloture at times.
7. Planning is important--processes of projecting forecasting and planning lead to more effective current activities and decisions.
8. All Stakeholders are important.

9. Influencing Educational Policy and Curriculum is an important function of the chief administrative officer.
10. Technology is a tool to be unharnessed and utilized and is not inherently dehumanizing.

Assumptions

Implicit in the funding and design of a 36-day executive program, such as the Bush Program, are the following assumptions which must be continually examined by the faculty and staff:

1. Managerial skills (technical, interpersonal, diagnostic, etc.) can be learned (and/or their future learning can be facilitated) in the classroom.
2. Enhancing appropriate knowledge, skills and attitudes can lead to more effective managerial action.
3. Appropriate attitudes which lead to more effective managerial performance can be identified, described and shaped.
4. Conscious competence is to be preferred over unconscious competence.

Exhibit III

December 30, 1980

MEMORANDUM

TO: PROSPECTIVE EVALUATORS

FROM: Charlotte Mitau, Associate Director

Enclosed is a Request For Proposal with various attachments. We are seeking an outside source to evaluate this unique executive development program for upper level public school administrators.

After reading the enclosed material, we hope you will be challenged to develop an insightful, creative proposal. As stated on page three of the RFP, what we need first is a letter of interest which must be received no later than January 19, 1981. A briefing session will be held February 5 for those wishing more information. The final proposal is due no later than March 6, 1981.

REQUEST FOR PROPOSAL

The BUSH PUBLIC SCHOOLS EXECUTIVE FELLOWS PROGRAM requests a proposal to evaluate its program. This request does not obligate us to complete the project and we reserve the right to cancel the solicitation if it is considered to be in our best interests.

A. HISTORICAL BACKGROUND

The BUSH PUBLIC SCHOOLS EXECUTIVE FELLOWS PROGRAM is a unique program which began in 1976 as a result of a grant awarded to the Minnesota Association of School Administrators by the Bush Foundation of St. Paul, Minnesota. The program accepts twenty-five Minnesota public school administrators who participate in a series of extensive educational sessions for thirty-five days over a period of eighteen months. One hundred participants have completed the program and twenty-five additional participants are in the current program. The program has been recently refunded through November 1983.

B. GOALS AND OBJECTIVES OF THE EVALUATION PROJECT

The objective of the evaluation project is to ascertain the effectiveness of this program in achieving its goals, namely, improving the management of school districts in the State of Minnesota. (Refer to brochure attached.) While we recognize the difficulty of measuring outcomes of this kind of educational effort, we feel that some measurable results in participants and the performance of the organizations they manage can be identified and related to their participation in the program. The Advisory Board of the BUSH PUBLIC SCHOOLS EXECUTIVE FELLOWS PROGRAM, in seeking this evaluation, believes that the following questions should be addressed in the

evaluation:

1. IMPACT ON PARTICIPANTS

   Is there evidence of any change in the participants as a result of the program in terms of,

   a. leadership
   b. job attitude
   c. problem analysis and decision-making
   d. management skills
      i. dealing effectively with subordinates
      ii. dealing effectively with parent and citizen groups
      iii. general and financial planning and evaluation
   e. use of the network of peers (fellow participants)
   f. professional advancement
   g. personal renewal and commitment to education

2. IMPACT ON COMMUNITY, REGION OR STATE

   a. Do school board members, district administrators, community people and others recognize any impact on the participants they know as a result of the program?
   b. Is there evidence of the participant's increased professional leadership in the community, region and state?

3. PROGRAM CONTENT

   a. Have we met the program's objectives?
   b. Are the results worth the cost of the program?
      i. Is the money allocated toward the "setting" and environment, where the modules are held, well spent?
      ii. Is the cost of the case study method and case development effective in terms of learning? Are there alternatives that could achieve the program objectives at less cost?
   c. What has been the effect of special programs for board members, spouses, and alumni fellows?

C. METHODOLOGY

The proposal should describe the methodology to be used. Respondents should consider the use of questionnaires, interviews, records, reports, case studies and budgets.

D. SUBMISSION OF PROPOSALS

All letters of interest and proposals should be sent to:

Charlotte Mitau, Associate Director
Bush Executive Fellows Program
350 Hanover Building, 480 Cedar Street
St. Paul, MN 55101

1. Letters of interest must be received no later than January 19, 1981. A briefing session for all those interested in responding to the Request for Proposal will be held in our offices on February 5, 1981

2. Proposals must be received no later than March 6, 1981. Late responses will not be accepted. Submit 12 copies of the final document. Each copy must be signed by an authorized member of the firm. Prices and terms stated in the proposal must be valid for the length of the project.

3. All proposals submitted become the property of the BUSH PUBLIC SCHOOLS EXECUTIVE FELLOWS PROGRAM.

E. PROJECT COSTS

The cost of this project shall not exceed $20,000.

F. PROPOSAL CONTENTS

The following will be considered minimum contents of the proposal:

1. A restatement of the objectives and goals of the evaluation to demonstrate the responder's view of the nature of the project.
2. Identification and description of the products to be provided by the responder.
   a. Oral presentation of the final report

b. At least 15 copies of final report.

3. An outline of the responder's background and experience. Identification of personnel to conduct the project with details as to training and work experience. No change in personnel assigned to the project will be permitted without our approval.
4. A detailed evaluation design specifying timelines, data collection procedures, sampling procedures and a breakdown of the cost for each component in the project.
5. Identification of the level of our participation in the project as well as other services we are to provide.

G. EVALUATION OF PROPOSALS

Factors upon which proposals will be judged include, but are not limited to, the following:

1. Expressed understanding of project objectives
2. Project work plan
3. Project cost detail
4. Qualifications of both company and personnel. Experience of project personnel will be given greater weight than that of the firm.

Evaluation and selection will be made by a sub-committee of the Advisory Board and staff and will be completed by March 31, 1981. Results will be sent immediately by mail to all responders.

H. CONTRACT

Included in the contract will be a requirement for a brief monthly progress or status report. Work should begin within two weeks of awarding of the contract. The project is to be completed by September 1, 1981.

I. ATTACHED DOCUMENTS

1. Brochure
2. Application form
3. Original proposal
4. Roster booklet

Exhibit IV

EXECUTIVE SUMMARY
Evaluative Report on the Bush Public Schools Executive Fellows Program
Submitted by Projects for Educational Development
September, 1981

1. The charge and the response. In April, 1981, the Advisory Board of the Bush Program commissioned Projects for Educational Development to conduct a comprehensive evaluation of the Program. Refering to the first four Bush classes (100 Fellows from 1976-80), the Advisory Board asked these fundamental questions: Have participants learned? If so, just what have they learned? Has that learning been applied to the improvement of public schools, the Program's ultimate aim? With what effects? Is the Program effectual and efficient in promoting learning and its application? (See pages 1, 11-14 in the text of the Report.)

Projects for Educational Development used a combination of statistical and non-statistical methodologies for answering these questions. We conducted interviews (late April) with 16 people (Advisory Board members, staff, and Fellows) and reviewed Program archives to define more precisely the evaluative concerns and possibilities. We decided upon target populations -- Fellows and persons who could be expected to know their work and their districts on a first-hand basis over time -- to which we would direct assessment questionnaires and from which we would draw representative samplings for interviews. We developed an interview strategy to get "deep background" information and selected six Fellows around whom we would collect data. We designed, "field tested", and administered two extensive and parallel questionnaires to all 100 Fellows and to 100 "observers" (in sets of five observers for each of 20 representative Fellows). We conducted interviews in June and early July with 35 people -- the six Fellows and their observers. In July, we subjected the "objective" response data from 124 completed returns (82 from Fellows; 42 from observers) to five computer-based statistical analyses and the written and oral responses to open-ended questions to contextual analysis. We compared the various sets of analyzed data to one another in order to define and to substantiate the answers. The results, we believe, are basically definitional and tentative in nature, but well enough documented to warrant a high degree of confidence in their meaning. (See pages 3-10 and Appendices 1-3 and 5.)

2. The overall assessment. At the most general level, all the major indicators suggest that the Program is "worthwhile". It has, in this summative sense, contributed to the social good by fulfilling the purposes for which it was designed and funded. Affectively, Fellows (and observers) are strongly disposed toward the Program (pages 14-16). In terms of learning and of its application to managerial practices, Fellows' mean score responses to the three critical overall assessment items on the questionnaire (70, 71 and 74) and to the two "impact" sections in it (items 1-37 and 46-69) strongly suggest that change has occurred along the lines desired by the Program's decisionmakers. Fellows' responses to open-ended questions consistently support that conclusion. So, too, do observers' responses to the questionnaire (pages 16-19). Fellows' responses, moreover, to multiple choice, oral, and written questions indicate that nearly all responding Fellows approve of the Program as it has been constructed; their critiques and suggestions for improvement are made within the spirit of strong support (pages 19-20). (See also Appendix 4.)

3. Learning and its application. In dealing with the nature and extent of changes in Fellows and in their schools as a result of the Program, we narrowed the scope of concern. We assumed that the test of the Program's contribution would be measured fairly only in terms of Fellows' managerial practices, not

more "ultimate" impacts of schools on students (pages 21-23). Once the factor of "rating inflation" in responses to the questionnaires has been discounted properly, the remaining value of certifiable change in Fellows and in their on-going managerial practices is impressive. It is important to understand that the data describe refinements and improvements, rather than transformations (pp. 23-26).

There are 20 skill/knowledge sets of learning that fall in the range of significance; such learning has occurred primarily in the functional management areas of Managing Self, Directing others, and Planning. (See Table 3A.) These conclusions are supported by a variety of statistical and contextual analyses, such as comparisons of Fellows' and observers' mean scores in relatively complete Fellow-observer sets, Fellows' own attempts to articulate their learning, and the results of multiple regression analyses. Even using very conservative rules to establish "significance", the data permit us to say that most Fellows across the four classes learned a great deal about executive management. We know that there are some differences in outcomes among the classes, but the differences are not great. (See pages 26-30.)

With respect to the more important question about the Program's relationship to change -- whether Fellows have applied learning for the improvement of managerial practice -- the data describe real, though less extensive impact than was measured in Fellows' learning. Especially significant changes were noted by Fellows and observers in the areas of long-range planning, fiscal management, and improved relations with school boards. Again, Fellows' mean score results are supported by varieties of other data similar to such which corroborate impacts on Fellows. (See pages 30-35.) Interestingly, the only biographic and demographic factors bearing on impacts seem to be position held at time of appointment and size of district. The smaller the district and the closer a Fellow was to the top of the heirarchy, the more likely he/she was to perceive substantial impact on the district. That finding suggests the need for the Program to develop compensatory programming for Fellows from larger districts and those further away from top leadership positions (pages 35-36).

Several factors need to be taken into account in assessing the ultimate meaning of detected impact as statements about the Program. First, the changes certified clearly fall in areas of Program intent (pages 37-39). Second, impacts on Fellows and on schools are tied together (pages 39-40). Third, Fellows did not learn much and few gains are apparent in school management in areas which the Program did not stress, an indication of the Program's focused instrumentality (pages 40-41). Fourth, the learning is neither unidirectional nor unidimensional but, rather, personal and situational (pages 41-42). Fifth, one of the real measurement problems with the Bush Program is that it is its own standard of comparison, thus tempting the onlooker either to over-attribute or to under-attribute impacts to it (pages 42-44). Finally, even positing the "worst case" scenario about Program effects, we can reasonably argue that it is functioning at an 85% success rate in at least one area of learning considered primary and at a 54% success rate in promoting improvements in the areas of ongoing school practices it heavily emphasizes (pages 44-46.)

4. Accounting for impacts. Tested against a five factor "model" of effective programming for professional development (pages 47-50), the Bush program can be said to have contributed directly and substantially to the impacts which are documented. In short, the Program has functioned (certainly for the Fellows in the four classes we studied) as a powerful learning system and may be said to be "responsible" for the learning and applications which have occurred.

The Program attracts and selects Fellows who, with few exceptions, have high levels of "felt need" or motivation for professional development as administrators (Factor One). The needs are experienced in several ways and Fellows' responses to them approximate what students of achievement motivation have discovered to be effective for learning. We recommend that, because of the significance of the "felt need" factor in adult learning, the Program should continue to rely primarily on self-selection in decisions about recruitment and appointment. (See pages 50-55.)

The Program works as an effective "focused opportunity" for learning with respect to both its content and its processes. High Fellow ratings on overall assessment items related to content (item 72), process (item 73) and to Program as a professional development experience (item 79) provide clues that such is the case (pages 55-57). More specifically, Fellows' ratings and the tenor of most of Fellows' 230 specific comments suggest that the Program's content and processes are highly "appropriate" to nearly all Fellows' felt needs for learning. The appropriateness of content (Factor Two) is a function of a) the Program's general credibility (through its association with M.A.S.A., the Bush Foundation, "high powered" faculty, and visible other Fellows); b) especially, the relevance of content to real needs; and, c) sufficiently challenging "dissonance" from Fellows' previous knowledge and skills base. At most, there may be a need for some "tightening" of content relevance, but certainly not for recasting Program content. (See pages 57-62.)

The appropriateness of the Programs' processes (Factor Three) are functions of Program staff's observance of three critical conditions for learning: a) providing adequate amounts of "time on task"; b) filling that time with active "guided practice" in mastering content; and c) using positive "reinforcing" strategies. Despite the overall effectiveness of the Program's reliance on these learning principles, the data suggest room for improvement. Daily schedules are lengthy, "exhausting" and may be too rigid in emphasizing formal learning too much and informal learning and personal integration of learning too little. The issue is one of optimizing time on task. The Program utilizes the case study method and individual Projects as its two chief "guided practice" vehicles, but distinct minorities of Fellows resist the former and do not take sufficient advantage of the latter. These teaching strategies, therefore, are not quite as powerful as they could be. We recommend that the Program relax the schedule somewhat to permit more informal learning time; that staff develop a "guidebook" or manual of use for introducing the case study method and its intended purposes; that staff provide more counsel to Fellows on Project definition and development; that staff build (or emphasize more) "guided practice" in the application of learning to practice; and, in all, that staff think of ways to increase the amount of individualization of programming, consistent with the general history of Program emphases and teaching/learning strategies. Except for working on these (as special features of "reinforcement") strategies, we see no need to modify other aspects of programming. The Program's reliance on such "reinforcing" mechanisms as using supportive faculty, resorting to "executive settings", encouraging congeniality among Fellows, and attending religiously to detail seem appropriate and valuable. (See pages 62-73 for the extended discussion.)

Program staff, from the beginning, have paid attention to the last two factors in the model of effective programming: support for Fellows from "significant other" persons in their home districts (Factor Four) and, of lesser importance, the Program's general "diffusion" activities (dissemination, network support among alumni, etc. -- Factor Five). Together these are critical to the "transfer of training" from program settings to on-the-job practices. There is strong inferential data to suggest that the Program might do more to bolster support for Fellows within districts and to strengthen its other diffusion efforts. The

intensive interviews conducted in June helped illuminate the importance and the broad incidence of reinforcement for (presumably) most Fellows, certainly five out of the six around whom we structured the interviews. The Program, to this point, seems to have looked not inappropriately but exclusively to School Board chairpersons and to spouses as the "significant others". The data suggest that "mentors" (other than chairpersons), peers, and subordinates are also significant. The Program might assist Fellows to build support for their learning and attempts to apply it among these groups as well. Program staff are also urged to build some "focused opportunities" for learning among alumni as an aid in sustaining their motivation to apply learning. (See pages 73-79.)

5. Recommendations recapitulated and extended. Projects for Educational Development makes 33 specific suggestions that seem warranted by the data and an analysis of the evaluation strategy itself.

Seventeen suggestions are for maintaining the integrity of the Program as is. Based on the recognition that the data are overwhelmingly positive about the Program and the impacts it has fostered, these recommendations include maintaining the emphasis on "executive" level development, on applying learning, on self-selection as the critical appointment criterion, on the connection with M.A.S.A. and the Bush Foundation, on using faculty with the best reputations, on optimizing key conditions for learning, on the use of the case method and the individual Project assignment, on "executive" quality training settings, and on the continuous cycle of program assessment by Fellows. (See pages 80-83.)

Eight recommendations are directed to strengthening, but not radically altering, what already works for most Fellows. The objectives of these suggestions are to help the Program overcome resistances to learning among a pretty small minority and, especially, to aid more Fellows through the processes of applying learning to managerial practices on the job. They include stating learning objectives for Program and modules more precisely, deciding which longer-range applications deserve attention (and limiting acceptable Project definitions accordingly), assessing more carefully Fellows' learning needs and backgrounds, updating such assessments, increasing "relevance" of content through (perhaps) developing a modified "tracking" system, reducing the amount of formal time on task, developing a manual of use for case studies, providing more counsel to Fellows who encounter difficulty in defining Projects, and bolstering mechanisms for helping Fellows think through how to apply what they have learned. (See pages 83-85.)

The last set of six recommendations amounts to a prescription to strengthen on-going evaluation of the Program, either based on the definitional work accomplished through this study or, at least, informed by what we have uncovered. Included are suggestions that Program decisionmakers re-examine the kinds of changes in public education you want to effect, sharpen the descriptions of learning and application "gains", test the definitions we have developed (if you believe we are on the right track), decide whether you really want some sort of cost-effectiveness or cost-utility study and commit resources adequate to those tasks, strengthen the strategy of assessing the long-term effects of individual Projects, and institute an on-going process for generating data about changes through time. (See pages 85-88.)